



Daily Market Recap

Friday, 7 August 2026

STOCK MARKET HIGHLIGHTS

NGX Statistics	06-Aug-26	07-Aug-26	Change %	YTD (%)
NGX All- Share Index	245,209.34	245,573.60	0.15	57.81
Market Capitalization (N'Trn)	158.28	158.51	0.15	59.51
Market Cap. (\$Bn)	116.05	116.14	0.07	
Total Value Traded (N'Bn)	20.45	26.65	30.28	
Total Value Traded (\$'Mn)	15.00	19.52	30.18	
Total Volume Traded (Mn)	531.75	1,518.47	185.56	
Number of Deals	44,755	42,517	-5.00	
Market Breadth	0.92x			

Sectors	06-Aug-26	07-Aug-26	Change%	YTD (%)
Banks	2,547.40	2,586.38	1.53	70.62%
Insurance	1,162.85	1,160.35	-0.21	-2.44%
Consumer Goods	4,328.65	4,328.65	0.00	8.88%
Oil and Gas	5,242.99	5,240.85	-0.04	96.27%
Industrial Goods	10,546.57	10,507.25	-0.37	85.10%

Top Gainers	Open (N)	Close (N)	Gain (N)	Gain (%)
UPDC	3.25	3.55	0.30	9.23%
CWG	18.30	19.50	1.20	6.56%
MANSARD	12.50	13.10	0.60	4.80%
NEIMETH	8.25	8.60	0.35	4.24%
CUTIX	2.50	2.60	0.10	4.00%

Top Losers	Open (N)	Close (N)	Loss (N)	Loss (%)
REDSTAREX	20.00	18.00	-2.00	-10.00%
CAP	128.25	115.45	-12.80	-9.98%
JOHNHOLT	11.20	10.10	-1.10	-9.82%
ABCTrans	5.75	5.20	-0.55	-9.57%
LEGENDINT	4.60	4.20	-0.40	-8.70%

Source: NGX, SCM Capital Research

NASDAQ OTC Snapshot

Statistics	06-Aug-26	07-Aug-26	Change %	YTD (%)
NSI	4,657.59	4,678.08	0.44	32.01
Market Capitalization (?'Bn)	2,795.56	2,807.85	0.44	32.43
Value Traded (?'000)	99,159.81	6,004.96	-93.94	
Volume Traded	2,893,539	535,756	-81.48	
Deals	62	36	-41.94	

Source: NASD, SCM Capital Research

Equities

Stock market closes week on a positive note

The stock market closed the week on a bullish note, as the NGX-ASI advanced by 0.15% to close at 245,573.60 points. Consequently, market capitalization increased by N235.12 billion to N158.51 trillion, while the year-to-date return improved to 57.81%.

Having recorded gains in four out of five trading sessions this week, the benchmark index closed 0.12% higher week-on-week. Strong performances in FCMB (+13.10% w/w), FIRSTHOLDCO (+12.23% w/w), VITAFOAM (+7.90% w/w), ACCESSCORP (+2.47% w/w) outweighed losses in CADBURY (-9.92% w/w), DANGSUGAR (-7.24% w/w), NESTLE (-2.22% w/w), and UNILEVER (-1.35% w/w).

Market activity was mixed on a week-on-week basis, as volume traded increased by 4.70% to 5.36 billion shares, while the value traded declined by 65.65% to N139.05 billion.

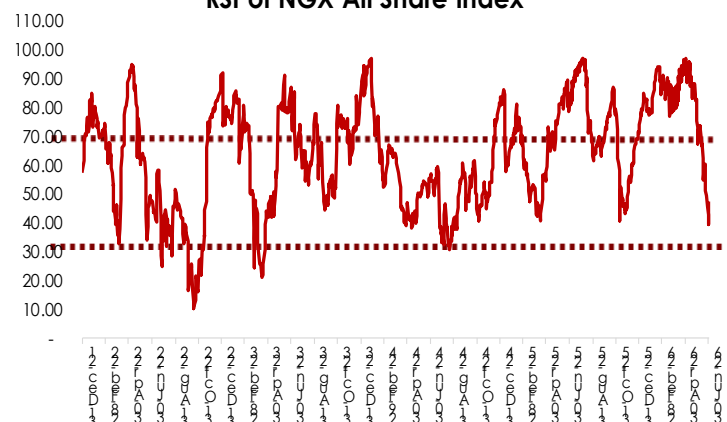
In today's trading session, FTGINSURE (+3.17%) led the volume chart with 824.46 million shares traded, while ACCESSCORP (+3.26%) topped the value chart, with 176.21 million shares valued at N4.67 billion.

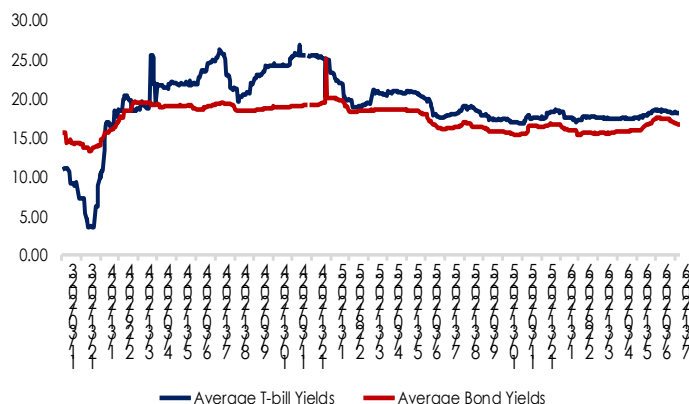
Investor sentiment, as measured by market breadth (advancers-to-decliners ratio), improved to 0.92x from 0.69x in the previous session, with 22 advancers and 24 decliners.

OUTLOOK

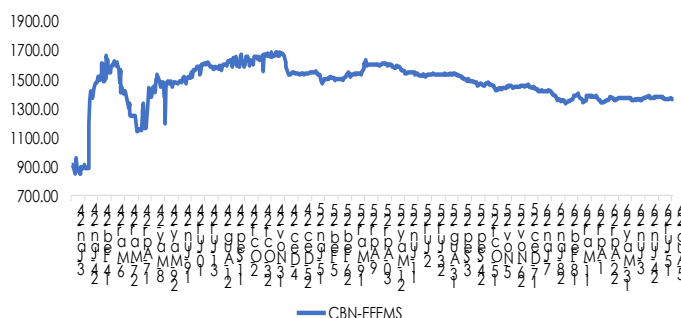
Next week, we expect market sentiment to remain cautious as investors take position amid release of half-year corporate earnings.

RSI of NGX All Share Index

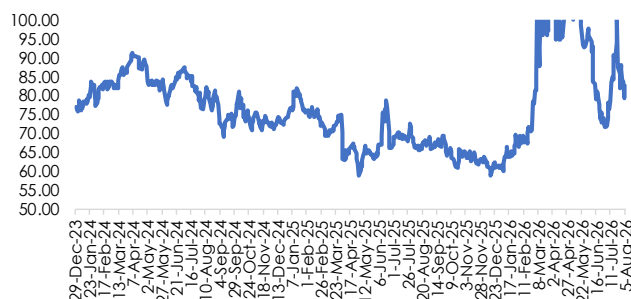


Money Market
Friday, 7 August 2026
Fixed Income Yield Trend


Source: FMDQ, SCM Capital Research

Foreign Exchange Rates Trend


Source: CBN, SCM Capital Research

Brent Crude Oil Price

Fixed income market summary

	7-Aug-26	6-Aug-26	Change(bp)
T-bills	Current	Previous	
3m	17.09	17.10	↓ 0.01
6m	18.42	18.46	↓ 0.03
12m	20.24	19.94	↑ 0.30

FGN Bonds	Current	Previous	Change(bp)
3yrs	17.00	17.00	→ 0.00
5yrs	17.19	17.12	↑ 0.07
7yrs	17.31	17.07	↑ 0.24
10yrs	17.21	17.21	→ 0.00

FGN EuroBonds	Current	Previous	Change(bp)
3yrs	6.05	6.09	↓ 0.04
5yrs	6.61	6.66	↓ 0.05
7yrs	6.70	6.73	↓ 0.03
25yrs	8.02	8.05	↓ 0.03

FX	Current	Previous	Change(N)
CBN - EFEMS	1,364.88	1,363.85	↓ 1.03

Source: FMDQ, CBN, SCM Capital Research

Money Market

At the secondary NTB market, average yield rose by 3bps to settle at 18.23%. The O/N rate closed flat at 22.10%.

Fixed Income

At the secondary Bond market, average yield rose by 1bp to settle at 16.71%.

Currency

The Naira at the EFEMS depreciated by 0.08% at N1,364.88/USD.

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